



January 6, 2004

OKLAHOMA BULLETIN NO. OK250-4-17**SUBJECT: FNM – WebTCAS Definitions**

Purpose: To provide a user's guide and clarification to assist employees in accurately recording WebTCAS time charges.

Expiration Date: September 30, 2004

Chief Knight provided guidance in April 2003 that conservation planning assistance (first seven steps of the conservation planning process) should be charged to Conservation Technical Assistance (CTA) (General or Grazing Lands). In his letter, and in WebTCAS guidance documents, guidance is provided that activity code – "Planning Assistance" is to be used for CTA, Watershed Planning, Watershed Rehab, and RC&D programs. Planning Assistance prior to applications being funded for cost-share assistance in programs except Conservation Reserve Program (CRP), Wetland Reserve Program (WRP), and Watershed Surveys and Planning will be charged to CTA – General or CTA – Grazinglands.

Specifically, activity code "Planning Assistance" will be charged to WRP or CRP after the client makes application when assisting the client with the first seven steps of the planning process. CRP planning assistance should be limited as NRCS does not have primary responsibility in developing CRP plans for contracts. Activity code "Planning Assistance" **will not** be used for Environmental Quality Incentives Program (EQIP), Wildlife Habitat Incentives Program (WHIP), Farm and Ranch Lands Protection Program (FRPP), and Emergency Watershed Protection Program (EWP). Planning assistance for those programs will be charged to activity code "Contract Planning Assistance" after the application is approved for funding.

Program time charges for such programs as EQIP, GRP, WHIP, FRPP and EWP are applicable for activities such as; "Eligibility and Ranking" and "Training ". The time associated with assisting an applicant in applying for Farm Bill programs and completing ranking criteria should be charged to the program for which the application is being made. General explanation of Farm Bill Programs to potential clients should be charged to CTA – "Communications and Relations".

Time charges to EWP will not be made until National Office approves the project for funding. State staff will provide time reporting procedures at that time.

Special Emphasis Program Managers (SEPM) who have been assigned collateral duties may charge time to activity code – "Administrative Support Infrastructure" when carrying out SEPM responsibilities. This activity code is not applicable for field employees unless they are SEPM managers.

NRCS does not receive technical assistance funds for such former programs as GPCP and SWCA. However, we still have active contracts in these programs. WebTCAS allows employees to charge time to these programs and then by hidden format rolls these hours into CTA. Employees working on these types of programs should continue to charge time in WebTCAS to the program and the system will roll the hours into CTA.

Attached to this bulletin is a WebTCAS Activity Code user's guide to assist employees in

choosing the right program and activity codes when completing WebTCAS time entries. This user's guide is a supplement to the official WebTCAS definition guide. The entire guide can be accessed at the following website: <http://www.nrcs.usda.gov/webtcas>; under "Quick Access" click on "Program Description".

Direct Charge responsibilities require accurate time charges. Employees must ensure the accuracy of their time charges to the applicable programs and activities. If an employee exceeds hours allocated to them for a specific program(s), the first step must be to verify the accuracy of the time charges and working with their timekeeper make corrected Time & Attendance reports, if required. The second step will be for the employee to notify their immediate supervisor and State Leadership Team supervisor. The State Leadership Team supervisor will determine if hours can be shifted within their area of responsibility.

If hours cannot be transferred within their area of responsibility, the SLT supervisor will work with the SLT to determine if hours can be shifted within the state. When it is determined that hours cannot be shifted, the State Conservationist, after determining that these steps have been taken, will stop program activity and request additional funds from National Headquarters. If funds cannot be secured, program activity will be suspended.

Before program activity can be suspended the above mentioned steps must be followed. State Conservationists must ensure that all actions have been taken to keep program activity flowing as long as there are hours available in that program. It is imperative that all employees assure proper time charges and work within their program allocations.

Questions concerning this bulletin or applicable time charges should be directed to your State Leadership Team supervisor.

/s/ - (Kevin Norton – Acting)

M. DARREL DOMINICK
State Conservationist

Attachment

DIST: AO

WEBTCAS ACTIVITY CODES AND DEFINITIONS

Planning Assistance

Technical assistance for planning of land use and treatment decisions by individuals, units of government, tribes, organizations and groups in CTA, Watershed Planning, Watershed Rehab, and RC&D, includes collecting and analyzing resource data, developing and evaluating conservation alternatives, and documenting decisions **(steps 1 through 7 of the NRCS planning process)**. Planning assistance prior to applications being funded for cost-share programs should be captured here as program **CTA (General) or CTA (Grazing lands)**. **Planning assistance after applications are approved for funding should be charged to Contract Planning Assistance to the specific program.**

Applicable activities prior to program applications being approved for financial assistance includes:

- ✓ Analyzing landowners resource needs
- ✓ Conducting inventories and evaluations
- ✓ Planning of conservation practices and systems
- ✓ Cultural resource and ESA considerations
- ✓ Actual development of conservation plan
- ✓ Plan and soil maps
- ✓ Planning required for program applications
- ✓ Developing plan in CST **(Does not include preparation of AD-1155e or AD-1156e.)**
- ✓ Determining practice needs and extents
- ✓ HEL/Wetland determinations
- ✓ Conducting site investigations for housing authorities
- ✓ Reviewing erosion/sediment control plans

Eligibility and Ranking

Assistance in completing, determining eligibility and ranking of individual applications for Continuous CRP, EQIP, GSWC, FRPP, GRP, WHIP, WF-03, WF-08 AND WRP programs. **(If planning assistance activity is required to complete eligibility and ranking, these activities should be charged to CTA (General) or CTA (Grazing lands) Planning Assistance.)**

Applicable activities include:

- ✓ Developing eligibility criteria
- ✓ Revising ranking criteria
- ✓ Developing ranking sheets
- ✓ Completing applications
- ✓ Completing eligibility determinations
- ✓ Completing and documenting ranking determinations

Contract Planning Assistance

Technical assistance for planning of land use and treatment decisions **after an application has been approved for funding** in the following programs: CRP, EQIP, GSWC, FRPP, GRP, WHIP, WF-03, WF-08 and WRP. Also, includes any planning assistance needed for the preparation of contract modifications for programs previously listed and de-authorized programs FIP, GPCP, RAMP, & SWCA. **This does not include the development of contract support documents; this is included in Contract Development and Project Support.**

Applicable activities include:

- ✓ Developing and evaluating conservation system alternatives
- ✓ Collecting and analyzing resource data
- ✓ Finalize cost of needed practices
- ✓ Finalize conservation plan
- ✓ Developing plan maps
- ✓ Planning for contract modifications

Application Assistance

Survey, design, and installation of all land treatment practices and structures under **all** programs (cost shared and non-cost shared). **This includes steps 8 and 9 of the planning process.**

Applicable activities include:

- ✓ Surveying
- ✓ Practice design
- ✓ Practice layout
- ✓ Practice checkout
- ✓ Evaluate operation and maintenance of practices
- ✓ Follow-up to determine if practices are performing properly and meeting client needs
- ✓ Trip reports (**Charge to CTA-General**)

Program Management

Program management and analysis activities at the national, regional, state and field levels, includes developing rules, policies, procedural manuals, and handbooks for funding and implementing agency programs and providing guidance. **Limited use by field personnel.**

Applicable activities include:

- ✓ Analyzing program reports and performance information

Contract Development and Project Support

Completing contract support documents (**AD-1155e**), completing and processing modifications (**AD-1156e**) and payment documents, correcting errors and omissions, certification of work completed by a TSP, and preparing reports for administrative appeals and hearings. Applicable programs include: CRP, EQIP, GSWC, FRPP, GRP, WHIP, WF-03, WF-08, WRP and de-authorized programs FIP, GPCP, RAMP & SWCA. **Does not include contract and compliance reviews.**

Applicable activities include:

- ✓ Development of program contracts (**AD-1155e**)
- ✓ Modification of program contracts (**AD-1156e**)
- ✓ Certifying payment documents
- ✓ Processing payments
- ✓ Errors and omission corrections
- ✓ General program contracting administration (disputes, reports, etc.)

Quality Assurance and Evaluation

Conducting or participating in functional, oversight and evaluation, management, administrative, soil survey field, and other quality assurance reviews, including contract and compliance

reviews. Applicable programs include: CRP, EQIP, GSWC, FRPP, GRP, Soil Surveys WHIP, WF-03, WF-08, WRP, and de-authorized programs FIP, GPCP, RAMP & SWCA.

Applicable activities include:

- ✓ Quality review (spot checks of applied practices)
- ✓ Quality review of TSP work
- ✓ Program, contract and compliance reviews (**Includes annual contract status reviews.**)
- ✓ HEL compliance reviews
- ✓ Conservation planning certification
- ✓ Watershed inspections (**Charge to CTA-General**)
- ✓ State Office – Zone quality reviews

Resource Surveys, Studies, and Analyses

Development, collection, database input, maintenance, digitization, analysis and presentation of resource data originating from the NRI, RCA, NCP, strategic plan, soil survey, and plant materials programs. Included are state and/or local inventories that are not the result of conservation planning with a client.

Applicable activities include:

- ✓ Gathering of information and developing conservation program funding proposals (ex: EQIP LEA Proposals)
- ✓ Conservation Tillage Report
- ✓ Plant evaluations and field trials
- ✓ NRI field data collection and analysis
- ✓ Damage survey reports after a natural disaster
- ✓ Soil mapping functions
- ✓ Soil survey digitizing
- ✓ Soil survey manuscript preparation
- ✓ Soil survey database

Communication and Relations

Developing and presenting conservation information for employees, partners, customers and stakeholders. Also, includes outreach to potential customers to inform them of program availability.

Applicable activities include:

- ✓ Presenting conservation information to employees, partners, customers and stakeholders
- ✓ Attending Conservation District board meetings
- ✓ Attending Conservancy District board meetings
- ✓ Attending RC&D meetings
- ✓ Attending County Commission board meetings
- ✓ Attending other agency or organizational in-service meetings (i.e. OACD)
- ✓ Locally-led efforts
- ✓ Conservation Education
- ✓ All informational activities (**News releases, newsletters, informational mailings, etc.**)
- ✓ Presenting general program availability information to clients

Training

Includes developing, delivering and attending all training, both formal and informal, whether technical, non technical, or program.

Training (cont'd)

Applicable activities include:

- ✓ Developing and delivering training
- ✓ Attending training

Technology Development, Transfer and Maintenance

Includes all technology development, transfer and maintenance.

Applicable activities include:

- ✓ Zone Technical Guide Committee Meetings
- ✓ Maintaining Field Office Technical Guide
- ✓ Developing proposal for interim practice standard
- ✓ Developing technology models and tools

Management and Supervision

Providing or receiving supervisory and/or management assistance.

Applicable activities include:

- ✓ Developing personnel performance standards
- ✓ Conducting or attending performance reviews
- ✓ Conducting or attending periodic reviews and appraisals
- ✓ Developing and documenting Plan of Operations
- ✓ Developing Workload analyses information
- ✓ Entering time and progress (WebTCAS and PRS)
- ✓ Staff meetings
- ✓ Team meetings
- ✓ Zone meetings
- ✓ Maintenance of government vehicles and equipment

Competitive Sourcing Studies

Includes working directly on Competitive Sourcing Studies only. This may include study team activities, human resource activities, and procurement activities. **Limited use by field personnel.**

Applicable activities include:

- ✓ Develop performance work statements
- ✓ Develop and advertise solicitation
- ✓ Develop independent government estimate
- ✓ Review bids
- ✓ Make decisions
- ✓ Review appeals